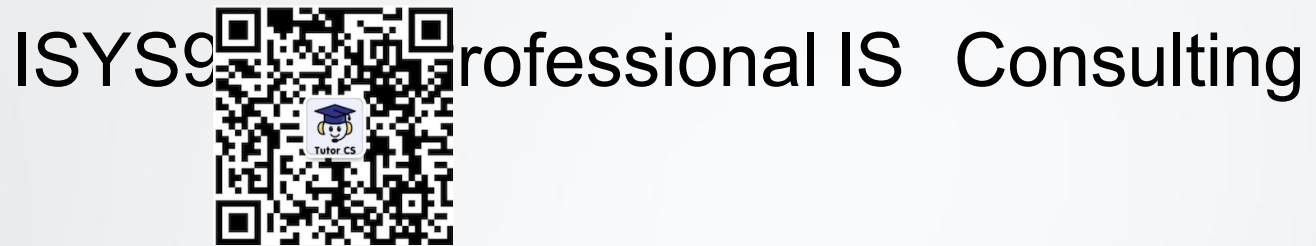


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Seminar 3  
Consulting Proposals and the  
Assignment Project Exam Help  
Engagement Life Cycle  
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**The Engagement Lifecycle**

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# Engagement Lifecycle

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How is work won and performed in consultancies?

- Depends on engagement
- A typical flow



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# Engagement Lifecycle

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Risk assessment  
internal inquiry



- Are we allowed to do this work?
- What could happen if we take this work?
- Could we cause a significant outage?
- Would our final report be given to anyone else?
- Is the client reputable?
- Do we have the right people?

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# Engagement Lifecycle

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Winning the work



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- Review the RFI, EOI, RFT, RFQ
- Determine client requirements
- Identify who your bid team is
- How do we do this work?
- Prepare the response
- Review, review, review and sharpen
- Prepare for questions, consultations.

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# Engagement Lifecycle

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Contractual  
negotiation



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- Confirm budget
- Negotiate scope and legal clauses governing delivery.
- Sign Contract

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# Engagement Lifecycle

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Delivery and project  
management



- Performing the work
- Kick-off meeting
- Ongoing project management (timeline and task completion, budget).
- Deploy Methodology

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# Engagement Lifecycle

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Close-out and C



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- Review of outcomes with leaders
- Can include an internal legal review of deliverables.
- Final Presentation
- Steering Committee
- Sponsor
- Final iterations
- Sign Off

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# Proposals

# Why do consultants exist?

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Personal Reflect



A bit of a recap – and setting the tone for today:

- Why do executives and organisations hire consultants?
- What are they looking for from this experience?

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# Proposals

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- What is a proposal?
  - Written on a potential seller to a client
  - Contains (other things):
    - A summary of services to offer
    - Expression of the business problem to be solved
    - Budget
    - Team
- Can be in any format
- Proposal writing can be a full time job!
  - Experts on engagement methodology
  - Deep technical and industry specialisations
  - Knowledge of the sales process.



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# Before you bid

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Typically require a  to happen first:

- Is there risk in working on?
- How will we manage risks?
- Enter the sales pipeline (visibility over pipeline)
- Inform your internal lead partner (if there is one)
- Who will be your team?

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Can we win the bid?

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- Proposal effort takes significant effort
- Even bids for smaller engagements can take days to prepare
- This is hard if you're also doing your full-time job!

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# Can you win the bid?

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Ultimately, will it be worth our time and investment?

- ? Do we know
- ? What do we know about their organisation?
- ? Did we know about the job before the RFP came out?
- ? What is the work 'really' about?
- ? Is there potentially more risk than reward?

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*Some consulting organisations will not bid if they don't have a relationship with the client.*

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# Case study

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You work for Icarus Consulting, a mid-tier firm specialising in IT project services including project management, business analysis and testing and release services. You don't have developers to build products, but you have several trusted companies you sub-contract to.

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As a Director, you are already busy managing several accounts – however, on a rare day in the office, a partner taps you on the shoulder, late on a Monday afternoon, to ask for your help...

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To illustrate the process, we will step through a case study.

# Should we bid?

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Discussion exercise in groups:



## Scenario 1

You have been bid to provide testing services to help the implementation of a core banking system. This is a key engine behind their internet banking service. It is well-known in the press that this is so far a wildly unsuccessful and expensive project that has been running for years.

You have never worked at the client before, but there would be a certain prestige for working with them.

Should you bid?

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# Proposals: Formal or informal

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- When is a formal proposal required?
  - In response to a request out to the market
  - Often required for public sector
- When can an informal proposal result?
  - Direct approach, via relationships with client
  - If informal may be arranged through:
    - Providing high-level material on budget, methodology
    - Moving directly to an engagement letter/ contract
    - Verbal agreement?

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# Types of proposals

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Type	Description
Request for information	High-level request by a client to understand what products and services are in the market.
Expression of interest (EOI)	Used to test supplier interest (inviting suppliers to submit future proposals).
Request for quote (RFQ)	More focused on pricing and price-per-unit (more for standardised or commoditised services).
Request for tender (RFT)	Formal request by a client for potential suppliers to submit bids. Commonly used by Government Agencies.
Request for proposal (RFP)	As per the RFT, but for private entities.

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# Know your audience

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Like a presentation, your audience for a proposal

We write these for Consider:



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Who are they?

May impact language, content, style, information presented, industry experience.

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What do they want?

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What is the best way we can solve this problem for them?

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What don't they want?

Do we sell them something they don't want or need?

# Should we bid?

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Discussion exercise:



## Scenario 2

You have been over-seeing services for a small Government Agency for three years. Your client – the CIO, Benny Robinson – is a key promoter of Icarus. You have been invited to bid to provide project management and business analysis services. The Agency has been reliant on expensive contractors in this function that have not integrated well with generally efficient internal project teams. The contractors are being removed for the successful tenderer. This will be a three-month engagement while Benny sources a full-time team.

Should you bid?

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# Big wins come in stages

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The first objective is to make the shortlist

- It is unlikely that a decision will be made by the client in one pass of the proposal
- There might be a lot of them!
- RFPs/ RFTs require client analysis and shortlisting

If you make the shortlist, the real selling starts!

- You are likely to be asked to make a presentation

If it is a very big contract, then multiple submissions and presentations will be required

If you are chosen, then the contract negotiations begin

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# Before you submit your proposal



- Ask to meet the client
  - If you can walk the client through the major points of your proposal
  - Test their reactions
  - Good indicators for your approach, budget, team, etc
- Some government organisations will only permit proposal briefings to all bidders to avoid being accused of favouritism
  - Likewise for responses to questions
  - Can be highly structured (e.g. dates for submission of questions).

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# Pay attention to the details!

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- Make sure you satisfy criteria
  - Ensure you include details including:
    - Company details
    - Insurance certificate
    - Staff references
    - Relevant qualifications and case studies
  - Watch out for any price cap
- You do not want to be knocked out because you forgot to include some requested element
- Initial proposal evaluation will likely be done by functional staff as a 'box ticking exercise'
  - These knock out proposals that miss criteria.



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# What to include in your proposal

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Remember:



- The final decision will likely be senior
- They will refer proposal to functional staff for evaluation of technical aspects

“Should the proposal contain technical details?”

- Answer: It depends on the client
- Are they technically-focused or –minded?
- If the client is an engineering firm, defence, aircraft, or electricity company then yes they will want lots of technical information.

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# Best sales moment?

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Discussion exercise:



What makes a sale? Think about a time where you were sold something – anything! Then discuss:

- What were you buying?
- What made you complete the transaction?
- Did you actually want it?

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# Structure of a proposal

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- Avoid clutter
- A well structured proposal:
  - Is easy to read and evaluate
  - Assists the client in properly evaluating the proposal
- If you have detailed technical specifications then include them as appendices
- Use diagrams and pictures to aid understanding of complex elements.



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# Four Parts of a Consulting Proposal

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<https://www.youtube.com/watch?v=eZ59JCMoi6I>

# Structure of a proposal

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What goes into a good proposal?



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Is there anything else?

# Structure of a proposal

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Executive  
summary

- Present the main points of your proposal
- Is a summary: NOT an introduction
- Consider an academic paper abstract.

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Introduction

- Present the background and scope of the work requested
- Present the structure of the proposal
- Outline how you're suited for this work
- Also a good opportunity to raise prior work performed.

# Structure of a proposal

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Our  
understandin  
g of your  
needs

- Option of your interpretation of the request
- What does the client want?
- What is the real issue that you're looking to solve
- Don't just restate their text from the RFT/ RFP!

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Engagement  
methodology  
and timelines

- What is your special recipe for doing this work?
- What is the actual process for doing this work?
- How will you present it?
- Funky Gantt Charts, milestones, icons?
- Project governance structures

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# Structure of a proposal

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Pricing and assumptions

- What is your total price?
- What is a budget the client has in mind?
- What are you telling the client in your costing?
- Are there any discounts you can apply?
- What assumptions have you based this on (e.g. limits on number of workshops, certain activities you're not doing, you're only performing a high-level study, etc)?

Team CVs

- Who is going to be doing the work?
- Structure of the engagement team (roles, responsibilities, job titles)
- Who is 'actually' going to be doing the work?
- Descriptions of what people's expertise is, past engagements, etc.

# Structure of a proposal

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Similar work  
we have  
performed



- es so you can demonstrate your expertise in
- What are the big success stories for your organisation in doing similar work?
  - Who did you do it for, how did you do it?
  - What were the benefits?

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# Proposals - summary

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Pre-bid activities for risk and effort

Proposals as a key for winning work

Proposal structure and purpose of each section

Next week:

- Client ecosystem
- Dealing with different personalities

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